

METHOD AND SYSTEM FOR EXCHANGE OF FINANCIAL INVESTMENT ADVICE

ABSTRACT OF THE DISCLOSURE

A method and system for distributing professional investment advice to investors is provided. A computerized exchange system permits one or more advisors to make investment strategies available to subscribing investors. Each strategy defines a sequence of trade transactions that are consistent with strategy parameters and are designed to achieve the risk and return objectives of the strategy. The strategies are distributed to subscribers who can undertake the recommended transactions using separate brokerage accounts. A subscriber can maintain a corresponding portfolio that assigns weighting factors to various strategies in order to provide a customized investment strategy. Accordingly, the exchange system can provide professional fund manager trading decisions to individual investors in near real time without the administrative burdens or costs associated with traditional mutual funds.